QUIC
QUARTERLY INTELLIGENCE COHORT

Market Report

Q2 2017

Executive Summary

ENGLISH**UK**

englishuk.com/quic

Prepared on behalf of:

ENGLISHUK

English UK
219 St John Street, London EC1V 4LY, United Kingdom | +44 20 7608 7960
www.englishuk.com | info@englishuk.com

Prepared by:

studentmarketing
YOUTH TRAVEL CONSULTANCY

StudentMarketing Ltd.
Salztorgasse 2, 1010 Vienna, Austria | +43 650 612 4527
www.student-market.com | research@student-market.com

Q2 2017
Introduction

Market insight is crucial for business success, and English UK is committed to supporting members by providing better and faster information. This is the executive summary of the second report from our new optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), which introduces features not available in our existing student statistics reports.

QUIC provides in-depth, quarterly analysis of the UK English language teaching (ELT) industry's source markets. The full reports are available only to QUIC members, who can use them to benchmark their performance and monitor market trends. They include student weeks by source country, age group, booking source and programme type, and regional comparative analysis. The executive summary is made publicly available.

With 124 members, QUIC's 2017 cohort is the largest sample in English UK's history of quarterly reporting. To reflect the diverse nature of the sector and the association's membership, data was gathered from year-round and seasonal centres, as well as Higher Education (HE) and Further Education (FE) colleges from both the private and state sector. All English UK members will get an opportunity to join the 2018 cohort in December 2017.

Added value has been achieved through the outsourcing of data processing to StudentMarketing, an independent market research firm and UNWTO Affiliate Member. StudentMarketing is also a member of ESOMAR World Research. The cleaning and fine-tuning of the data to international research standards means that the market intelligence is more exact, more precise, and therefore more reliable than ever before. Members can be confident in the robustness of this Q2 report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

This is the first step in the development of QUIC. Over time, further add-ons such as historical comparative and sub-sector analysis will be provided to develop English UK's vision of supporting members to success with timely, sophisticated market insights.

For more information on QUIC, please email statistics@englishuk.com.

Note: Data is provided in student weeks, defined as one student taking 10 or more teacher-taught hours in one week. Those studying fewer hours are excluded from the calculations.

QUIC
QUARTERLY INTELLIGENCE COHORT

Q2 2017
Introduction

Table 1
QUIC region summary

Region	No. of returns	Proportion of returns	Total weeks	Market share
	🗂	%	Σ	%
South and South Eastern England	29	23.4%	36,240	20.5%
London	24	19.4%	45,999	26.0%
Northern England	20	16.1%	41,996	23.8%
South West England and The Channel Islands	15	12.1%	20,554	11.6%
Eastern England	12	9.7%	16,466	9.3%
Scotland	6	4.8%	6,349	3.6%
Central England and Wales	6	4.8%	3,967	2.2%
Multi-centres	12	9.7%	5,028	2.8%
Total	**124**	**100%**	**176,599**	**100%**

Note: Percentages do not add up to 100% due to rounding.

Note: There are no English UK member centres from Northern Ireland currently participating in QUIC. Furthermore, Wales was merged with Central England, as not enough member centres from this region are participating in QUIC at the moment.

Note: In Q1 2017 multi-centres were categorised by the location of their headquarters. To improve accuracy, multi-centres are now categorised separately.

Q2 2017
Overview

In Q2 2017, the 124 English UK member centres who report QUIC data registered a total of 176,599 student weeks – 17% more than Q1 (Note: 6 centres detailed no student weeks for Q2).

The ratio between adult and junior student weeks at the centres declaring data for Q2 2017 averaged out at 89% to 11% (156,634 adult student weeks to 19,965 junior student weeks). The proportion slightly shifted towards juniors (91% to 9% in Q1).

Chart 1
Student weeks by age group

■ Adults
■ Juniors
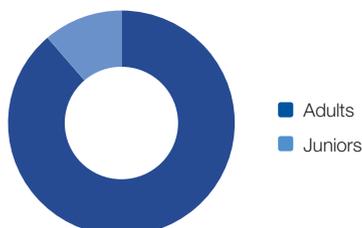
Chart 2
Student weeks by booking source

■ Commissionable
■ Non-commissionable
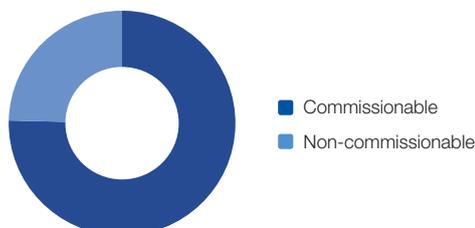
Three quarters of all student weeks (132,940) were booked through a commissionable source (e.g. via a study abroad partner agency).

Chart 3
Student weeks by course type

■ General English
■ Business & Professional English
■ English Plus
■ EAP
■ ESP
■ One-to-one
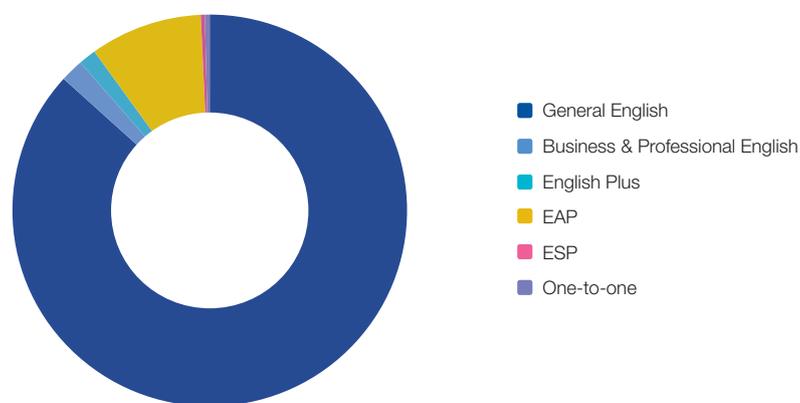
Out of all course weeks, 86.7% were spent studying General English. English for Academic Purposes (EAP) programmes exhibited greater demand in Q2 compared to Q1, and represented 9.2% of student weeks. Business and Professional English courses accounted to 1.9% of all student weeks, while the market share of English Plus stood at 1.4%.

Q2 2017
Overview

Chart 4

Student weeks by age group and source country (top 10 markets)
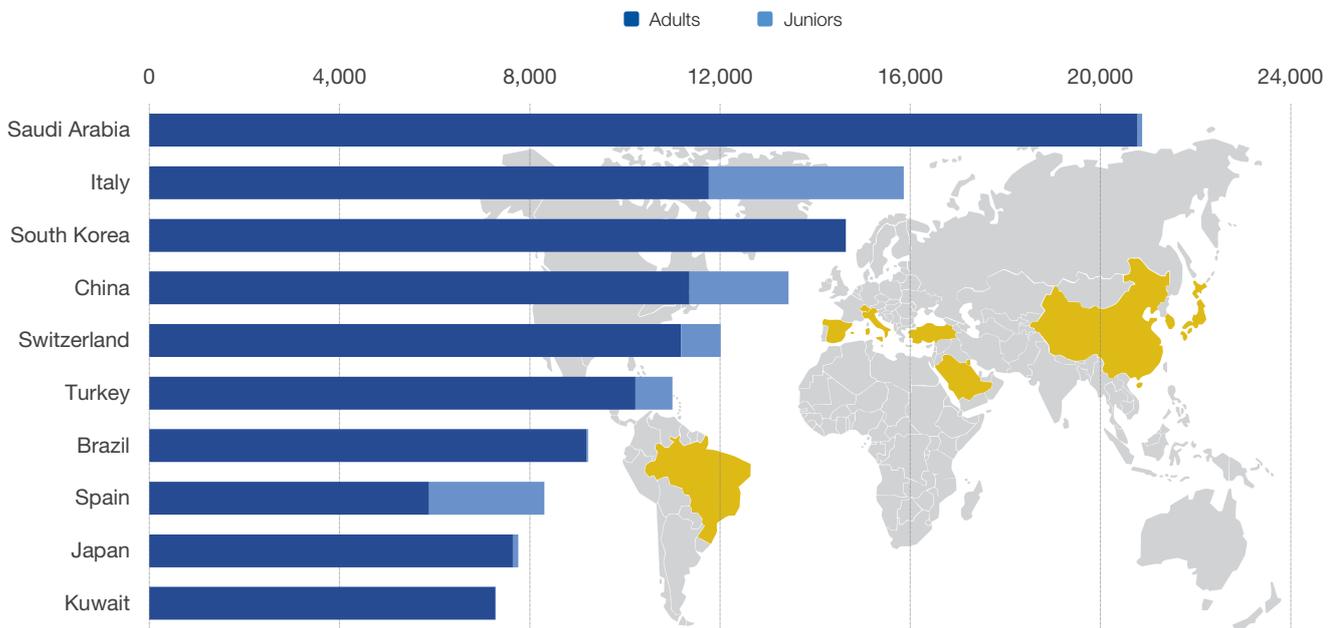
The leading source markets in Q2 2017 were Saudi Arabia (20,876 weeks), Italy (15,862), and South Korea (14,643).

As the top three source markets generating junior student weeks, Italy (4,101), Spain (2,424), and China (2,084) represented 43% of all junior student weeks reported in Q2.

QUIC

QUARTERLY INTELLIGENCE COHORT